Alberta Tourism Market Monitor

New direct, daily flights between Mexico City and Calgary

Mexican visitors will be able to enjoy all that Alberta has to offer in the near future, as Aeromexico begins direct, daily flights between Mexico City and Calgary, June 1, 2017. Easier access and a recent decision by the Government of Canada to lift visa requirements for Mexican visitors will help enhance tourism and business activities between Mexico and our province.

Bright travel outlook for winter months

The Conference Board of Canada revealed its outlook for Canadian travel this winter. According to the *October Travel Intentions Survey*, seven out of 10 respondents said they plan to take a vacation between November 2016 and April 2017. One quarter of respondents intend to stay in Canada.

For more information please contact Emily Wang at tourism.research@gov.ab.ca or 780-427-6206

Due to the weak Canadian dollar, it is not surprising that fewer Canadians plan on visiting the U.S. this winter. More Canadians (24.5%) intend to travel to warmer climates, such as Mexico, Cuba, and the Caribbean, when compared to last year's statistics (21.8%). Travel intentions are highest among Albertans, with three quarters saying they intend to travel somewhere this winter, either in Canada, the U.S., or to an international destination.

Readers are cautioned that these results were travel intentions only. The challenge for tourism businesses is to convert the intentions into concrete bookings.

October eases for tourism industry

Slight increases in the price of oil and the Canadian dollar may be reasons why many indicators show that tourism activities for Alberta tapered off in October. While the occupancy rate for the Alberta Resorts region edged down 1.3% from the same time in 2015, to 57.4%, the average daily room rate remained high at $203, representing an increase of 7.4% over 2015. Outside of the Resorts region, the total occupancy rate for Alberta decreased by 5.2 points from October 2015, to 52.6%. The average daily room rate was $129, which is 7.1% lower than the same month in 2015.

Global Tourism Watch Reports

2015 Global Tourism Watch summary reports are now available on the Alberta Culture and Tourism website. These reports track intelligence and consumer changes in Alberta's core international target markets, identified as Brazil, France, India, Japan, Mexico and USA.

2016 Alberta Tourism Market Monitor

Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2016 (000's of arrivals and departures) [1]													
Edmonton International Total	602.7r	554.2r	578.3r	534.5p	592.0p	583.4p	645.0p	669.5p	588.9p	**586.1p**			**5,894.8p**
Per cent change from 2015	-6.8%	-1.3%	-5.8%	-9.8%	-2.7%	-2.5%	-5.6%	-5.7%	-2.2%	**-1.5%**			**-3.4%**
Domestic	400p	397.9p	426.7p	399.5p	492.7p	497.6p	559.1p	586.2p	503.7p	**491.7p**			**4,755.1p**
Per cent change from 2015	0.5%	4.5%	1.3%	-3.4%	12.3%	1.4%	-0.1%	0.5%	2.1%	**4.1%**			**2.2%**
Transborder	97p	95.2p	95.5p	85.7p	70.5p	63.0p	60.2p	57.2p	61.7p	**72.3p**			**758.5p**
Per cent change from 2015	-18.0%	-20.5%	-26.1%	-28.2%	-25.9%	-23.3%	-35.6%	-38.9%	-24.0%	**-25.5%**			**-26.3%**
International	65.4p	61.1p	56.1p	49.3p	28.8p	22.8p	25.7p	26.1p	23.4p	**22.2p**			**381.2p**
Per cent change from 2015	-0.5%	0.2%	-11.2%	-17.8%	-9.1%	-10.5%	-16.1%	-20.8%	-14.4%	**-13.3%**			**-10.0%**
Calgary International Total	1,205.9r	1,193.5p	1,304.2p	1,198.6p	1,257.9r	1,322.1r	1,549.5r	1,562.9r	1,343.3p	**1282.1p**			**13,219.6p**
Per cent change from 2015	0.5%	3.8%	2.9%	-2.2%	0.1%	1.3%	2.4%	0.4%	3.7%	**1.1%**			**1.4%**
Domestic	810.9r	810.7p	892.5p	836.6p	920.9r	966.9r	1,122.6r	1,140.8r	979.6p	**940.8p**			**9,422.4p**
Per cent change from 2015	1.2%	5.9%	6.3%	-0.9%	1.2%	1.2%	2.0%	-0.2%	3.1%	**1.2%**			**2.0%**
Transborder	236.3p	237p	263.2p	222.2p	225.3p	241.0p	290.5p	284.8r	246.5p	**240.1p**			**2,487.0p**
Per cent change from 2015	-7.2%	-6.5%	-6.3%	-11.8%	-5.2%	-1.0%	1.3%	-0.2%	1.8%	**-1.8%**			**-3.6%**
International	158.6p	145.8p	148.6p	139.8p	111.7p	114.1p	136.4p	137.3r	**116.9r**	**101.1p**			**1,310.2p**
Per cent change from 2015	10.3%	11.5%	1.4%	8.2%	1.9%	7.5%	9.1%	7.0%	**13.3%**	**8.2%**			**7.7%**
Fort McMurray International Total	67.9p	71.0p	76.4p	72.2p	9.8p*	46.2p	70.8p	74.2p	66.9p	**66.7p**			**622.1p**
Per cent change from 2015	-30.3%	-21.9%	-21.5%	-22.9%	-89.4%	-53.0%	-27.4%	-24.4%	-28.7%	**-23.7%**			**-34.3%**
Highway Count 2016 (000's of vehicles) [2]													
Hwy 1 -Sask border w-bound	57.1	57.5	71	67.2	79.2	83.5	113.5	108.8	84.9				722.7
Per cent change from 2015	-1.0%	0.4%	9.7%	-7.7%	-1.1%	-2.2%	2.2%	-0.5%	4.9%				0.5%
Hwy 1 - Banff Pk Gate (2-way)	542.1	550.8	626.1	573.6	685.7	741.1	1,031.4	1,014.10	758.6				6,523.5
Per cent change from 2015	8.0%	9.0%	15.0%	1.0%	1.0%	5.0%	8.2%	3.7%	9.3%				6.4%
Hwy 16 - Jasper Pk Gate (2 way)	90.1	89	118.8	114.4	149.1	173.6	254.6	249.4	168.7				1,407.7
Per cent change from 2015	-6.4%	-4.1%	6.4%	-7.3%	-0.1%	3.4%	8.9%	-1.9%	4.3%				1.2%
Hwy 16 - Blackfoot w-bound	143.9	139.2	160.3	160.8	174.8	175.2	186.2	188.9	173.4				1,502.7
Per cent change from 2015	-12.3%	-5.0%	-6.2%	-9.6%	-6.3%	-7.0%	-8.1%	-4.0%	-3.3%				-6.8%
National Park Attendance (000's of visitors) 2016 [3] Does not include Group Tours													
Banff	196.6	212.2	239.1	242.6	300.5	349.5	680.4	659.5	475.2	**142.0**	**131.5**		**3,629.1**
Per cent change from 2015	6.3%	12.5%	17.3%	-1.7%	1.4%	7.2%	7.9%	4.5%	9.7%	**-2.6%**	**12.7%**		**6.6%**
Jasper	51.0	55.2	71.6	140.3	180.3	211.3	468.2	453.1	319.4	**56.1**	**43.3**		**2,049.8**
Per cent change from 2015	-3.4%	3.0%	11.7%	-4.6%	1.2%	5.2%	8.1%	1.8%	7.7%	**-8.2%**	**4.3%**		**3.8%**
Waterton Lakes	8.5	11.5	13.1	19.6	41.9	80.0	130.7	122.3	69.6	**20.0**	**13.2**		**530.4**
Per cent change from 2015	26.9%	53.3%	40.9%	32.4%	6.9%	8.8%	14.3%	7.2%	16.6%	**-9.0%**	**67.1%**		**13.1%**
Elk Island	13.8	16.2	19.4	27.9	36.0	40.1	54.1	52.8	38.1	20.1	**14.3**		**332.8**
Per cent change from 2015	43.8%	79.7%	31.2%	42.9%	-8.6%	11.2%	29.0%	10.3%	20.1%	-18.6%	**-28.1%**		**13.0%**
Wood Buffalo	n/a	n/a	n/a	0.05	0.50	0.54	0.95	0.81	0.40	0.02	**0.02**		**3.29**
Per cent change from 2015	n/a	n/a	n/a	193.8%	42.9%	27.4%	8.3%	-18.8%	13.8%	-32.4%	**63.6%**		**7.1%**

Sources: Edmonton International Airport, Calgary International Airport, Fort McMurray International Airport, Alberta Transportation, Parks Canada.

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Employment (000's of persons) 2016 Seasonally Adjusted [1]													
Accommodation and Food Services	138p	135.7p	138.6p	141.0p	141.1p	146.9p	145.3p	151.2p	150.9p	148.9p	**148.4p**		**144.2p**
Per cent change from 2015	-12.0%	-13.7%	-11.1%	-8.1%	-10.0%	-6.6%	-5.6%	-1.9%	1.1%	-2.2%	**-0.3%**		**-6.5%**
Accommodation Indices for Major Regions 2016 [2]													
Edmonton Occupancy Rate	49.7%	59.0%	61.0%	60.7%	74.7%	61.8%	59.2%	60.1%	60.2%	**60.2%**			**60.7%**
Point change from 2015	-5.0	-6.7	-6.2	-7.3	10.5	-8.0	-5.7	-4.1	-4.4	**-2.6**			**-4.0**
Average Daily Room Rate	$128.02	$131.88	$131.91	$130.77	$124.87	$130.17	$127.5	$127.57	$128.14	**$131.27**			**$129.64**
Variance from 2015	-5.0%	-4.3%	-5.0%	-4.9%	-8.6%	-7.0%	-4.5%	-4.9%	-6.9%	**-4.1%**			**-5.2%**
Revenue per available room	$63.58	$77.83	$80.46	$79.38	$93.28	$80.51	$75.43	$76.63	$77.18	**$79.04**			**$78.64**
Calgary Occupancy Rate	45.8%	50.9%	53.5%	56.4%	63.2%	67.8%	78.1%	70.8%	67.5%	**55.6%**			**61.0%**
Point change from 2015	-9.4	-11.1	-10.2	-8.3	-6.5	-2.3	0.0	-5.0	-3.0	**-7.6**			**-6.4**
Average Daily Room Rate	$138.84	$138.98	$137.57	$142.24	$139.55	$157.87	$167.43	$136.14	148.33	**$141.19**			**$146.80**
Variance from 2015	-10.4%	-10.7%	-12.1%	-8.6%	-12.1%	-7.7%	-8.2%	-7.4%	-5.7%	**-9.1%**			**-8.3%**
Revenue per available room	$63.63	$70.69	$73.65	$80.23	$88.23	$107.03	$130.71	$96.42	$100.19	**$78.51**			**$89.52**
Alberta Resorts Occupancy Rate	42.5%	53.9%	55.4%	46.8%	63.5%	83.4%	93.1%	93.9%	87.5%	**57.4%**			**68.1%**
Point change from 2015	1.6	0.5	5.6	-1.6	3.4	6.5	2.5	1.9	5.3	**-1.3**			**2.3**
Average Daily Room Rate	$184.26	$195.28	$195.40	$180.42	$213.16	$279.58	$335.54	$332.47	$283.97	**$203.64**			**$255.78**
Variance from 2015	0.9%	10.7%	14.3%	5.8%	7.0%	9.1%	15.5%	12.3%	10.3%	**7.4%**			**10.2%**
Revenue per available room	$78.40	$105.22	$108.31	$84.36	$135.40	$235.58	$312.41	$312.04	$248.52	**$116.94**			**$174.16**
Other Alberta** Occupancy Rate	35.3%	39.6%	40.4%	39.2%	42.4%	48.3%	51.6%	52.1%	50.2%	**45.5%**			**44.2%**
Point change from 2015	-17.1	-15.9	-12.7	-9.8	-8.7	-10.3	-6.9	-4.8	-5.4	**-5.0**			**-9.8**
Average Daily Room Rate	$122.20	$123.10	$120.47	$116.27	$113.49	$123.76	$123.52	$121.13	$118.23	**$116.45**			**$119.93**
Variance from 2015	-9.0%	-7.8%	-8.3%	-10.4%	-10.7%	-3.7%	-4.5%	-5.9%	-7.5%	**-7.6%**			**-7.5%**
Revenue per available room	$43.09	$48.69	$48.70	$45.62	$48.15	$59.78	$63.74	$63.07	$59.37	**$52.98**			**$53.06**
Total Alberta (excl. Resorts) Occupancy Rate	42.4%	48.3%	49.9%	50.3%	57.6%	58.0%	61.7%	60.0%	58.2%	**52.6%**			**53.8%**
Point change from 2015	-11.5	-12.1	-10.4	-8.8	-2.8	-7.2	-4.5	-4.6	-4.3	**-5.2**			**-7.2**
Average Daily Room Rate	$129.50	$131.06	$129.79	$129.88	$126.09	$137.81	$141.35	$128.30	$131.68	**$129.03**			**$132.10**
Variance from 2015	-8.0%	-7.5%	-8.5%	-7.7%	-10.5%	-5.4%	-5.2%	-6.1%	-6.3%	**-7.1%**			**-6.8%**
Revenue per available room	$54.94	$63.24	$64.82	$65.35	$72.64	$79.94	$87.26	$76.97	$76.70	**$67.86**			**$71.10**

Sources: Statistics Canada, CBRE Hotels Trends in the Hotel Industry National Market Report.

Accommodation Indices for Selected Cities or Towns 2016 [6]													
Occ%= Occupancy Rate **ADR**= Average Daily Room Rate **RevPar**= Revenue Per Available Room	October			Year-To-Date				October			Year-To-Date		
	Occ%	ADR	RevPar	Occ%	ADR	RevPar		Occ%	ADR	RevPar	Occ%	ADR	RevPar
Airdrie	40.2%	$101.28	$40.70	47.0%	$105.26	$49.42	Banff	65.2%	$176.55	$115.04	74.9%	$217.11	$162.52
Bonnyville	35.7%	$108.34	$38.71	33.4%	$107.92	$36.03	Canmore	43.2%	$123.68	$53.47	63.8%	$158.56	$101.22
Drayton Valley	41.4%	$110.31	$45.68	30.4%	$114.52	$34.77	Drumheller	29.5%	$119.64	$35.28	42.3%	$137.08	$57.94
Edson	51.6%	$115.24	$59.47	49.2%	$114.33	$56.24	Fort Mac	56.3%	$139.06	$78.31	47.4%	$155.12	$73.58
Fort Saskatchewan	57.2%	$113.75	$65.10	48.2%	$116.59	$56.16	Gr. Prairie	50.3%	$124.92	$62.85	49.7%	$130.16	$64.65
High Level	39.0%	$123.33	$48.15	41.2%	$124.89	$51.50	Hinton	34.7%	$104.16	$36.16	51.0%	$126.55	$64.57
Innisfail	34.8%	$81.53	$28.36	33.2%	$84.26	$27.93	Jasper	58.4%	$182.32	$106.41	68.9%	$223.94	$154.29
Leduc	51.5%	$99.77	$51.42	51.6%	$101.79	$52.54	Lethbridge	55.0%	$107.95	$59.35	51.2%	$107.48	$54.99
Lloydminster	41.0%	$114.26	$46.85	45.6%	$115.63	$52.75	Med. Hat	62.9%	$108.99	$68.53	56.3%	$107.28	$60.36
Nisku	55.2%	$98.92	$54.58	54.1%	$101.25	$54.82	Red Deer	41.6%	$106.43	$44.31	41.1%	$107.16	$44.03
Sherwood Park	48.4%	$124.46	$60.19	45.9%	$127.98	$58.77	Whitecourt	44.1%	$116.39	$51.27	34.6%	$112.81	$39.02
Total Alberta	53.6%	$137.88	$73.92	56.2%	$149.13	$83.87							
	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Food Services and Drinking Places 2016 ($ Millions) unadjusted [7]													
Total Receipts for Alberta	671.64r	663.95r	730.00r	742.74r	774.33r	753.86r	774.81r	778.16r	754.88p				741.08p
Per cent change from 2015	-2.6%	0.9%	-1.5%	1.7%	0.4%	-0.3%	-1.3%	0.4%	1.8%				0.2%
Historic Sites and Museums 2016 (000's of visitors) [8]													
Visitor Attendance***	10.6p	26.4p	36.3p	33.6p	66.8p	84.3	190.0r	170.3p	63.0p	29.6p	21.7p		732.6p
Per cent change from 2015	-6.2%	14.3%	4.0%	-3.4%	6.4%	-3.1%	10.2%	-10.7%	0.0%	-8.7%	25.4%		-13.0%
Exchange Rates 2016 [9]													
Canadian Dollar/U.S. Dollar (noon)	0.70	0.72	0.76	0.78	0.77	0.78	0.77	0.77	0.76	0.75			0.76
Canadian Dollar/ Euro	0.65	0.65	0.68	0.69	0.68	0.69	0.69	0.69	0.68	0.69			0.68
Canadian Dollar/ Great British Pounds	0.49	0.51	0.53	0.54	0.53	0.55	0.58	0.59	0.58	0.61			0.55
Oil Price: Western Texas Intermediate (WTI) 2016 [10]													
Cushing, OK Spot Price (US Dollar per Barrel)	31.68	30.32	37.55	40.75	46.83	48.76	44.65	44.72	45.18	49.78	45.71		42.35
Major Tourism Projects Valued $5 million or Greater 2016 ($ Millions) [11]													
Total Value of Hotel Projects Inventory	$899	$1,102	$1,177	$799	$773	$773	$773	$764	$758	$666			$666

Sources: STR Inc, Statistics Canada, Alberta Culture, Bank of Canada, WTI, Government of Alberta.

*Commercial Air Service suspended from May 5-June 10 due to wildfire

**Other Alberta includes Lethbridge, Red Deer, and other Alberta communities.

***Please note some of the historical sites have changed their hours of operation - see Notes section for details.

Note: New monthly figures are shown in bold type. Revisions will be bolded.
r=revised p=preliminary

1. Air Passengers - Numbers are preliminary estimates of air passenger arrivals and departures at the Edmonton International and Calgary International Airports. From September 2015, total domestic passengers at Fort McMurray International Airport have been added.
Source: Edmonton International Airport, Calgary International Airport and Fort McMurray International Airport Websites.

2. Highway Traffic: These are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders counts all vehicles by direction. Year-to-date is a cumulative total for all vehicles.
Source: Alberta Transportation's Automatic Traffic Recorders (ATR). http://www.transportation.alberta.ca/3459.htm

3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.
Banff National Park and Jasper National Park reflect independent travellers only, and do not include people travelling as part of a tour group. The tour group data are included in the annual edition of the Market Monitor.
Source: Parks Canada.

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay or profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.
Source: Statistics Canada, Labour Force Survey.

5. Accommodation Indices for Major Regions - Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.

Revenue per available room is calculated using the occupancy rate and average daily room rate.

Source: CBRE Hotels Trends in the Hotel Industry National Market Report, with reproduction and use of information subject to CBRE Disclaimer and Restrictions as detailed at www.cbre.ca

6. Accommodation indices for Selected Cities or Towns- Destination reports are publications of Smith Travel Research Inc. (STR). Terms and conditions governing the ownership, distribution and use of these Destination Reports and their contents include that no historic data can be published, only current month and year-to-date data.
Source: STR Inc.

7. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the 3 digit NAICS level of 722, which includes: Full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year.
Source: Statistics Canada, Food Services and Drinking Places.

8. Historic Sites and Museums - Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Tyrrell Museum of Paleontology and the Tyrrell Field Station. **The Royal Alberta Museum closed on December 6, 2015.
Source: Alberta Culture

9. Exchange Rate- this is the average monthly exchange rate.
Source: Bank of Canada.

10. Western Texas Intermediate - This is the average monthly oil price.
Source: Cushing, OK WTI Spot Price FOB.

11. Major hotel projects in Alberta - This is the inventory of hotel projects in Alberta, including new hotels and renovations valued at $5 million or greater. It is not a complete list of hotel projects. The project stages included in the reported number are: announced, under construction and completed. If the project is completed, it will be removed from the inventory after 30 days from completion. More information on other tourism and recreation projects is available on the website provided below.
Source: Government of Alberta. http://majorprojects.alberta.ca/

19-Dec-2016